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## How to extract SFX holdings to load into Primo

- **Article Type:** General
  - **Product:** SFX
  - **Product Version:** 4
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Desired outcome / Goal

To prepare SFX extracts to load into Primo

Procedure

Generate initial extract in SFX

1. Log into SFX Admin
2. Go to Data Management > KBTools > Export Tool > Advanced Export Profiles
3. Click on the 'Manage Profiles' link
4. Click on the 'Add Profile' button
5. Name the profile
6. Select institute if needed
7. Select output format 'XML'
8. Select object type 'Serials'
9. Select services 'getFullTxt', 'getSelectedFullText' and 'getHolding'
10. Select 'Simplified Chinese Title' (selected by default)
11. Select Fresh export
12. Save profile
13. On the SFX server, log on as the instance user
14. Type da
15. Type ./server\_admin\_util
16. Select 10 Primo Export
17. Select 1 (Re)Export Primo file
18. When the extract is finished running it will be located here: /exlibris/sfx\_ver/sfx4\_1/<instance>/export/sfx4primo\_export/

Configure ongoing updates in SFX

1. Repeat steps 1 - 3 above.
2. Edit the existing export profile
3. Select 'Compare with previous export file'
4. Check the 'Exclude objects that were not changed' box
5. Save profile
6. In the Query Selection screen, go to 'Compare with previous export file' and select the previous export file in the dropdown.
7. On the SFX server, log on as the instance user
8. Type da
9. Type ./server\_admin\_util
10. Select 10 Primo Export
11. Select 3 Schedule Primo export file

12. Schedule the export to run on either a daily, weekly, or monthly basis depending on how frequently changes are made in SFX.

13. Extracts will be in this directory: /exlibris/sfx\_ver/sfx4\_1/<instance>/export/sfx4primo\_export/

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## Additional Information

See the SFX General User's Guide and the SFX Systems Administrator Guides for additional information regarding Advanced Export Profiles.

See the Primo Back Office Guide for information regarding loading data sources into Primo

**Subject:** Configuration

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